

Section 125 Flexible Benefit Plan Change of Status Request Form



If you have questions, contact your human resources department or call Chard, Snyder & Associates, Inc. at (513) 459-9997, toll free (800) 982-7715, or email at flex@chard-snyder.com.

1. Participant Information

Employer

Employee Name

SSN

Daytime Phone

Address

Check if New Address ☐

Email Address (optional)

If your qualifying event was incurred by a spouse or eligible dependent, then please provide the following information:

Name

Relation to Employee

Date of Birth (if eligible dependent)

2. Change of Status

Please check the box next to the appropriate change of status and provide a brief explanation of the qualifying event. Check all categories that apply. You may be required to provide documentation supporting your qualifying event.

- ☐ Change in Marital Status (marriage, divorce, death of spouse, legal separation or annulment)
- ☐ Change in Number of Dependents (birth, adoption, or death)
- ☐ Change in Employment and/or Eligibility of Self, Spouse or Dependent
- ☐ Change in Daycare Provider and/or Rates (dependent care reimbursement account only)
- ☐ Leave of absence in accordance with the Family Medical Leave Act
- Check one: ☐ Pre-Pay Option ☐ Catch-Up Option ☐ Opt-Out Option ☐ Pay As You Go
- ☐ Other Change

Explanation: _____

3. Change of Election



Healthcare Reimbursement Account

This is for out-of-pocket medical /dental / vision expenses

New Payroll Deduction Amount

\$ _____



Dependent Care Reimbursement Account

This is for child and/or adult daycare expenses.

New Payroll Deduction Amount

\$ _____



Other Section 125 Plan Benefit (please specify):

New Payroll Deduction Amount

\$ _____

4. Certification

I hereby certify that the Information supplied on this form is true and accurate.

Employee Signature: _____ Date: _____

(For office use only)

Approved ☐ Denied ☐

Effective Date _____

HR Representative Initials _____

Please return this form to your human resource representative on or before the end of your change of status grace period.